May 21, 2019

TO: Department Heads, Directors, Managers and Supervisors

FR: Kathy Moore, Compensation Manager, Human Resources

RE: A New Tool to Replace Web Merit

While we wait for news from the Office of the President regarding a 2019 Merit Program for policy-covered staff, we have been preparing a new merit processing tool to replace Web Merit. The tool we used for many years, Web Merit, was an online PPS-based tool that is no longer available to us in the UCPath environment. Unfortunately, the merit functionality in UCPath is still under development and will not be ready for use this merit cycle. In the interim, we have developed an Excel based tool for the collection of performance ratings and merit increases.

**Merit Roster Administration:**

Similar to past years, this year we plan to provide you with multiple rosters: (1) a preliminary roster for early data auditing and testing, (2) a secondary preliminary roster for additional data review, followed by (3) a final merit roster for data input and submission. Human Resources will distribute the rosters via Box.com. The timing of the release of the rosters will be dependent on the timing of the merit program announcement by the Office of the President. (Soon you will receive a Box email invitation to access the first preliminary roster(s) for your assigned department, cluster, division, etc.)

**REMINDER: THE FIRST PRELIMINARY ROSTER IS FOR DATA REVIEW AND TESTING ONLY.**

**Instructions to Access Rosters:**

1. Upon receipt of a Box invitation, click on the link provided and it will open up a view-only version of the preliminary roster. You have the choice of downloading the roster and saving it to your computer or opening it up with Microsoft Excel Online. You will need to choose one of these options to enter data into the spreadsheet to test the built-in formulas.

2. Review the roster(s) to ensure policy-covered career staff with hire dates of May 1st or earlier appear, all recent pay and classification actions are reflected, FTE percentages are correct, and all fund sources and fund source distribution FTE percentages are correct. If you find errors, please complete the necessary steps to correct the data in UCPath prior to the distribution of the final roster.

3. Contact Human Resources with any questions about the rosters and/or Box permissions.

**Roster Includes:**

- Data from a UCPath snapshot effective May 8, 2019
- Policy-covered career and partial year career employees
- Employees on active pay status through July 1, 2019
- Employees hired on or before May 1, 2019

To reiterate, the Office of the President has not yet announced a merit program for policy-covered staff. Due to the significant work required to develop and roll out a replacement for Web Merit, we are using this period of time to refine and test the Excel-based tool and provide you with an opportunity to test it as well. Formal guidelines regarding a merit program will need to wait for future communications. Human Resources will offer merit program workshops in the coming months as well.
If you have any questions or concerns regarding the early phase of this process or the preliminary rosters, please contact one of the following:

- Kathy Moore, Kathy.moore@hr.ucsb.edu, x7137
- Amy Arnold, amy.arnold@hr.ucsb.edu, x4068
- Linda Broen, linda.broen@hr.ucsb.edu, x4832
- John Ibach, john.ibach@hr.ucsb.edu, x4459
- Cynthia Seneriz, Cynthia.seneriz@hr.ucsb.edu, x8137

Thank you.

Kathy Moore  
**Compensation Manager**  
Human Resources  
Office phone: (805) 893-7137  
Office hours: 8:30-5:30pm  
Email: kathy.moore@hr.ucsb.edu